

## **PO Admin Checklist**

### **UNDERSTANDING PURCHASING ROLES**

The following should help identify which roles should be assigned to individuals in your agency.

<u><b>Job Duty</b></u>	<u><b>PeopleSoft Role</b></u>	<u><b>Permissions</b></u>
<b>BUYER:</b>	NDS_ALL_BUYER	Ability to enter POs in addition to contract administration and online PO inquiries.
	NDS_ALL_PO_APPVR	This enables the buyer to do an initial approval of the PO and enter the PO into workflow.

<u><b>Job Duty</b></u>	<u><b>PeopleSoft Role</b></u>	<u><b>Permissions</b></u>
<b>PO APPROVER:</b>	NDS_ALL_PO_APPVR	This role is in conjunction with one, some, or all of the workflow roles below, based upon approval authority within the agency.
<b>All workflow roles need an origin code assigned. This is determined and set up by the PO Administrator.</b>	NDS_WF_ALL_PO_APPVR_1000	The individual has authority to approve POs up to \$1,000.
	NDS_WF_ALL_PO_APPVR_2500	The individual has authority to approve POs up to \$2,500.
	NDS_WF_ALL_PO_APPVR_5000	The individual has authority to approve POs up to \$5,000.
	NDS_WF_ALL_PO_APPVR_UNLIMITED	PO Approval for agencies with step approval. Users with this role cannot have the PO Agency Admin role or the All Buyer role.
	NDS_PO_INQ	This gives approvers access to view POs and online PO inquiries.
<b>Note:</b>	A buyer may have initial approval authority up to one of these amounts as well, just never the Unlimited role.	

<u><b>Job Duty</b></u>	<u><b>PeopleSoft Role</b></u>	<u><b>Permissions</b></u>
<b>RECEIVING:</b>	NDS_ALL_RECEIVER	Shipment management, including entering the receipt of goods.
<b>Note:</b>	There are no restrictions on which personnel can be receivers. That is an agency decision; therefore it is a separate role.	

<u>Job Duty</u>	<u>PeopleSoft Role</u>	<u>Permissions</u>
<b>PO ADMINISTRATION:</b>	NDS_ALL_PO_AGENCY_ADMIN	Access to all procurement menus including reconciliation, contract mgmt., procurement analysis, POs, requisitions, inventory item definition, location definition, shipment mgmt., procurement card mgmt., and workflow administration.
<b>Note:</b>	OMB looks to the PO Administrator to train and support the buyers, requesters, approvers, and receivers for their agency.	

<u>Job Duty</u>	<u>PeopleSoft Role</u>	<u>Permissions</u>
<b>PO RECONCILIATION:</b>	NDS_PO_RECON	The ability to close and reconcile purchase orders. Users with the PO Agency Admin role do not need this one in addition.
<b>Note:</b>	This role is usually assigned only to agency personnel who have the Unlimited Approval role or who may work in accounting and PO vouchers.	

<u>Job Duty</u>	<u>PeopleSoft Role</u>	<u>Permissions</u>
<b>REQUESTER:</b>	NDS_ALL_REQUESTER	Requisition entry, maintenance, approval, and reconciliation. Includes online inquiries of requisitions.
	NDS_ALL_REQ_APPVR	This enables the requester to do an initial approval of the requisition and enter it into workflow.

<u>Job Duty</u>	<u>PeopleSoft Role</u>	<u>Permissions</u>
<b>REQUISITION APPROVER:</b>	NDS_ALL_REQ_APPVR	Requisition approval. Need to be used in conjunction with one of the workflow roles below for final.
	NDC_WF_ALL_REQ_APPOVER	Final Requisition Approver.
	NDC_WF_ALL_REQ_ACCTNG_APPRVL	Final requisition approver in accounting.